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**From:** FSA-BPOCOR Team <FSA-BPOCORTeam@ed.gov>  
**Sent:** Tuesday, July 9, 2024 5:02 PM  
**To:** grp.MOHELANextGenTeam  
**Cc:** Miller, Debbie; Jenkins, Lateata; Zavala, Nina; Parker, Kristen; Brown, Taris; Frisby, Emir; Deadwyler, Anita; Merchant, Denise; POC Change Request; Patillo, Aquita; Andre Barbosa; Booker, Anthony; Wise, Mark; Singleton, Rhonda; Lew, Kimberly; Cruz, Bruce J; Dick, Jeremy; Tricia Jackson-Harris; Lohrenz, Mark; Nixon, Josie; Brown, Alita; Odom, Christian; Smith, Shariva; Zeringue, Steven; POC Change Request; Merchant, Denise; Lisa Tessitore; Oversight Special Projects; Next Gen BPO; Boyd, Caryn; Samuels, Shaun; Samuels, Shaun; Burkhalter, Jermaine; Harvey, Daphne T.; Fenwick, Benjamin; Hawkins Panyard, Gabrielle; BCM\_Communications  
**Subject:** To BPO-MOHELA - CR 7109 - SDR - BPO Support of Student Debt Relief - Has Been Accepted to Request Impact Analysis  
**Attachments:** CR 7109 SDR - BPO Support of Student Debt Relief.pdf; SDR Requirements.v3 - CR7109.pdf

**Caution:** This email originated from outside the organization. Please take care when clicking links or opening attachments.

BPO-MOHELA,

An Impact Analysis is requested from BPO-MOHELA for the attached Change Request. The IA due date is on or before 07/12/2024.

If you have questions, please contact Denise Merchant, the CM BA assigned to this Change Request.

Additional Comments, (if any):

FSA request an Impact Analysis (IA) for the attached CR. The IA due date is on or before 07/12/2024.

If you have questions, contact Denise Merchant, who is the CM BA assigned to this Change Request and remember to copy the CORs

To keep our processes streamlined and ensure notifications are received, CORs and contractors should reply all to acknowledge receipt of this information.

To ensure that notifications are received and to keep our processes streamlined, please reply to all to acknowledge receipt of this information. Additionally, when submitting IAs, please email POCChangeRequest@ed.gov and copy BCM\_Communications@ed.gov on any CR email traffic.

Thank you,

The FSA BPO COR Team  
FSA-BPOCORTeam@ed.gov

**EXHIBIT**

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**Business Operations Change Request Form**

As Of: 7/9/2024 4:30:13PM

**Administrative Information**

CR: 7109      Drafted: 6/17/2024 2:10:19PM      Submitted: 6/17/2024 4:06:26PM

Title: SDR - BPO Support of Student Debt Relief

Sponsor: Regena Johnson

Business Analyst: Denise Merchant

Anticipated Implementation Date: 08/01/2024

**Change Request Details****Reason (Business Need):**

In September of 2024, the Biden-Harris Administration will launch the Federal Student Loan Debt Initiative. This initiative will deliver student loan debt relief to millions of borrowers, helping them prepare to return to repayment. To prepare for a successful launch of this mission critical initiative, FSA will leverage the Next Gen Business Process Operations (BPO) vendors to provide Debt Relief Contact Center Surge Support. If additional, dedicated customer support is not implemented timely, the Department of Education ("Department") will not be prepared to provide timely and accurate information to members of the public who seek guidance from the Department. This will result in confusion about opt out options and potential mission failure.

**Description (Requirements):**

Please see attached.

**Does this change require a new network connection****(Secure File Transfer Protocol is mandatory for all new connections)?** No**IST Anticipated?**

No

**FSA Service/System/Area Impacted**

Communications - Notification Only  
 Digital Customer Care (DCC)  
 Enterprise Risk Management - Notification  
 Enterprise Security - Notification Only  
 Policy, Implement & Oversight (PIO)-Notification  
 Vendor Oversight – Notification Only  
 BPO - EdFinancial  
 BPO – Cann & Associates  
 BPO – Maximus  
 BPO – MOHELA

**Validation - Artifacts and Corresponding Requirement IDs (Required for Services)**

Compliance Statement

**Artifacts Due Date:** 08/01/2024**BU Reviewer:**

<b>Change Request Details</b>
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**Reason (Business Need):**

In September of 2024, the Biden-Harris Administration will launch the Federal Student Loan Debt Initiative. This initiative will deliver student loan debt relief to millions of borrowers, helping them prepare to return to repayment. To prepare for a successful launch of this mission critical initiative, FSA will leverage the Next Gen Business Process Operations (BPO) vendors to provide Debt Relief Contact Center Surge Support. If additional, dedicated customer support is not implemented timely, the Department of Education ("Department") will not be prepared to provide timely and accurate information to members of the public who seek guidance from the Department. This will result in confusion about opt out options and potential mission failure.

**Scope**

FSA requires Next Gen BPO Vendors ("BPOs") to provide dedicated agents that shall become performance-ready by no later than September 9, 2024, and services will run through Oct 31, 2024. BPO personnel shall participate in debt relief training and provide contact center support services related to the Student Debt Relief (SDR) initiative.

**Customer Support Services**

Provide contact center support in responding to and resolving inquiries related to debt relief. Support includes, but is not limited to the following types of inquiries listed below:

- General information inquiries related to debt relief. This support will be limited to calls only.

**Service Level Agreements (SLAs)**

BPO Vendors shall be expected to comply with existing BPO Common Performance Standards (i.e., Non-Servicing Performance Metrics).

**Training**

FSA anticipates providing training to BPO vendors to ensure consistent handling of work and a common understanding of the targeted debt relief process holistically. As part of the training phase, the BPO vendors shall:

1. Participate in Train-the-Trainer sessions with FSA and/or the designated training vendor that will cover the support to be provided, access requirements, and needed processing.
2. The BPO trainers shall lead agent training sessions to ensure the agents are skilled in the new content areas.

3. The BPO shall ensure agents have appropriate access to all the necessary systems as defined in the current Steady State Task Order.
4. The BPO shall ensure that after attending the required Train-the-Trainer sessions, existing agents are trained on the Debt Relief content and that new personnel are trained on the following functional areas, UFSA, FAFSA, LDCF, in addition to Debt Relief content.

The below table defines the anticipated training duration for both upskilled and new personnel:

Training Duration	
Existing Personnel	1 business day
New Personnel	17 business days*

\* UFSA - 10, FAFSA – 3.5, LDCF – 2, Debt Relief - 1

### Forecasting Model

The following call volumes are estimated during the three-month duration. *NOTE: This forecasting was derived from a prior surge period of debt relief support with a slightly different programmatic structure.*

	Month 1 (9/9/24- 9/30/24)	Month 2 (10/1/24- 10/31/24)	TOTAL
Projected Total Debt Relief Calls Handled	61083	98,591	159,674
AHT (Assumptions)	AHT assumed: 13mins		

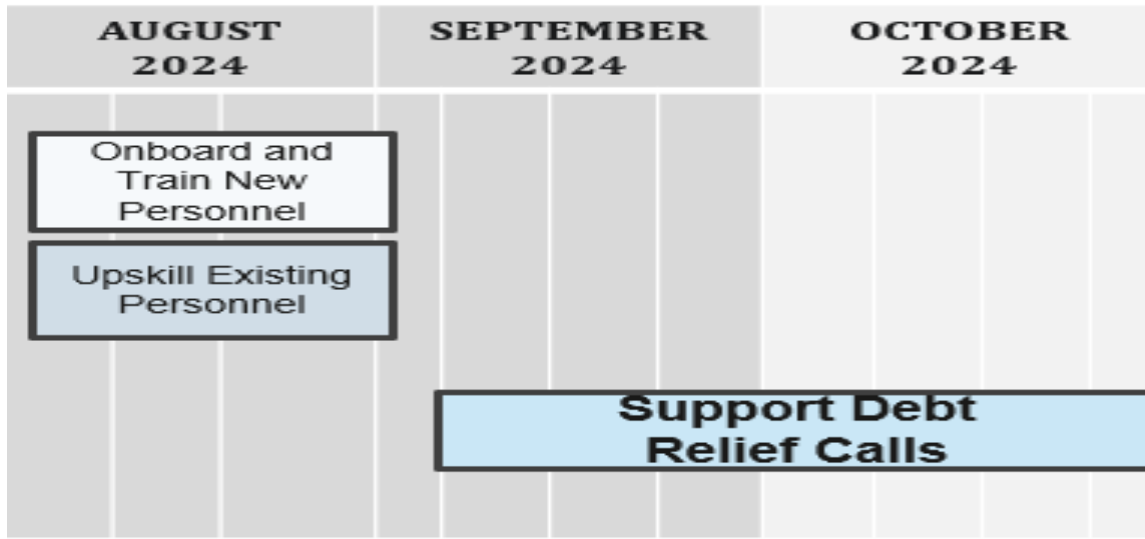
FSA will monitor SDR volume during the temporary support timeframe and may authorize SDR resources to be redeployed to other functional areas if SDR volumes are lower than expected.

### Requirements:

Ramp up:

- 1.00 The BPO shall attend all Debt Relief meetings hosted by FSA and DCC.
- 2.00 The BPO shall incorporate all operations support such as Quality Monitoring, IDO monitoring, Calibrations, FSA Listening and any other post operation support required by FSA.
- 3.00 The BPO shall ramp up staff to handle increases in volume specific to Debt Relief. The increased volume will impact calls only.
- 4.00 The BPO shall follow the current FSA requirements for onboarding and user access management for all new agents.
- 5.00 The BPO shall modify existing user's skills to add access to impacted functional area(s) separate from their other required hiring for non-servicing.

### Level and Timeline of Support



### Staffing Requirements

Staffing Requirements	Month 1	Option Month 2	Option Month 3
New Personnel (80%)	<ul style="list-style-type: none"> <li>9/9 – new personnel performance ready (Onboarded and fully trained)</li> <li></li> </ul>	Supporting Debt Relief	
Existing Personnel (20%)	9/9 Performance ready (upskilled and fully trained)		

### Clarification of the Requirement as it Relates to Other Efforts

*The Debt Relief Customer Support Services requirement is temporary support intended to bring on new and/or existing personnel that are immediately available to answer calls (i.e., ability to answer calls as soon as possible, but no later than the September 9, 2024). The government's requirement is for additional contact center capacity that can be immediately deployed on a monthly basis for up to 3 months. At least, 80% of the personnel leveraged under this requirement must consist of personnel that are separate and distinct from the personnel vendors leverage today for existing FSA Contact Center Operations.*

**Note:** *The Debt Relief CR to the BPO Providers is intended to aid BPO Providers by providing funding to assist with onboarding and training costs for new personnel (i.e., CSRs or agents), and for upskilling existing personnel to support Debt Relief calls. New personnel brought must be dedicated to Debt Relief calls and therefore cannot be the same personnel allocated to non-servicing functions.*

### **IA Guidance and Additional Information**

- FSA anticipates the vendor's IA will reflect the impact specific to surge hiring and training for newly hired agents resulting from the increase in volume for Debt Relief leveraging the forecasting model provided.
- The target CSRs are in addition to other required hiring for non-Servicing.
- FSA will not cover the cost of agents that have been transferred from other FSA contract vehicles (e.g., legacy Servicing, USDS, etc.), except as noted above for upskilling consideration of existing agents.
- BPO vendors shall ensure that staffing levels for Debt Relief Surge Support will support the anticipated volume forecasts provided by FSA and/or Next Gen partners in accordance with the terms and conditions of the BPO IDIQ Contract and Steady State Task Order (SSTO).
- This CR's reimbursement is limited to new hire training and upskilling of existing agent but does not include compensation for training BPO trainers, managers, QA teams, licenses or equipment.
- The objective of the CR is to ensure vendors are aware of and sufficiently prepare for Debt Relief Surge Support beginning September 9, 2024; and offer a subsidy for BPO training costs to facilitate new CSRs becoming "floor-ready" in a timely manner.
- All other required up-skilling or training post Debt Relief "Go-Live" for the new agents CSRs shall occur under normal BPO operations.
- IAs must clearly delineate which portion of the proposed ROM (e.g., tasks, # of hours, etc.) the vendor considers to be at no additional cost to the government and which ones will have an associated cost. Actual costs will be provided via vendor price proposals following IA approval.
- IAs should identify whether there are any ongoing costs; and if so, clearly state what those ongoing costs are attributed to.
- IAs should identify any risks and/or assumptions associated with CR implementation. FSA shall review the appropriateness of any assumptions and provide feedback, as necessary.
- CR 7109 will be placed under contract via a formal modification to the vendor's Steady State Task Order. CR implementation shall be applicable to hiring and training only.

### ***Performance-ready***

Vendors shall be considered "Performance-ready" when agents have been onboarded, trained and are floor ready by no later than September 9, 2024.

